**CRM SOFTWARE APPLICATION**

**Development Proposal**

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**Submitted To: ABC GROUP**

**Date: 06-Nov-2023**

**Document Status: DRAFT**

**INTRODUCTION**

The purpose of the proposed CRM Software is to streamlines and integrates operational activities to manage the ABC Group’s commercial unit project (Project Name). Following is the scope of the CRM Software to meet the organization needs and requirements.

**SCOPE OF WORK**

There are 3 sections of the document listed below:

**Part 1-Software Modules**

**Part 2- Hardware Requirements**

**Part 3 – Duration and Costing**

Part 1 – Software Modules

This section outlines the software modules that will be ship with the software. The CRM Software is a Server based desktop application. Client PCs connect the CRM Server via local area network (wired or over WIFI).

**1.1 MEMBERSHIP MANAGEMENT MODULE**

A complete management of member’s databank involved in the project , with the provision of create new members, assigning the Registered Key ID , storing all the prerequisites CNIC , Postal mailing address , permanent address, Cell no, Emails, Next of kin details for each member. Each Registered ID key belongs to allotted commercial unit.

**1.2 INVENTORY OF COMMERCIAL UNITS**

A complete inventory/ listing of All Commercial Units, List of Floors, Types of Commercial Units (Shop/Hall/Apartment etc) will be maintained.

Details of a single unit:

1. Unit No
2. Floor No
3. Area in sq. feet
4. Cost of the Unit
5. Status (vacant/allotted)
6. Other details

**1.3 INSTALLMENT PLAN CUSTOMIZER**

It includes Generic and customized installment plans for clients, Creating Schedule of charges for each unit , Payments schedule for each Account head , Receipts / Vouchers details , Date of transactions , Description of Transactions , Bank details , receivable & payables outstanding along with due amount recoveries.

**1.4 ALLOTMENT MODULE**

This feature allows ABC Group to allot commercial unit to its member upon completion of all due payments. Provisional and final Allotment Letters can be generated through the system.

**1.5 ACCOUNT REPORT/ACCOUNT STATEMENT GENERATION**

This feature allows ABC Group to issue Account Statement to its members. This statement will display:

1. Account Head
2. Due Date
3. Due Amount
4. Paid Amount
5. Outstanding Dues
6. Deposit Slip No
7. Bank Name

**1.6 CANCELLATION MODULE**

CANCELLATION OF allotted commercial unit, will cancel the commercial unit and the unit be will be captioned as:

1. BLOCKED FOR CANCELLATION
2. CANCELLED UNITS

Cancelled Unit will be restored to vacant inventory.

* 1. **REPORTING SYSTEM MODULE**

This module deals with report generation that may be exported in MS Excel format.

Following is list of reports:

1. List of Customers with allotted Commercial Unit.
2. List of Units categorized by allotted and vacant units.
3. Due / Paid payment as of today (Excel format)
4. Inventory report of vacant commercial units can be render via web browser based client (Google chrome), for this purpose additional hardware firewall will be required – details in part 2 section.

**1.8 RECOVERY MANAGEMENT MODULE**

This Module will help to translate recovery policy of ABC Group in the Real time efficiently and give a broader dashboard spectrum of Recoveries.

**1.9 TRANSFER MODULES**

This Module will provide the solution for execution of Transfer with all related fields of buyer and sellers details, embedded with linkup detail of schedules of payments.

Process flow for different types of transfer, initiation of transfer, Status of transfer, attachment of related documents belong to seller & purchaser.

**1.10 SOFTWARE SECURTY**

To protect the CRM System form an un-authorized access, User Account /Password account will be crated for each system user. Different Roles will be assigned to users to access only respective allocated module of the CRM system.

Part 2 – Hardware Requirements

Following is hardware requirement. This section outlines the hardware requirement of the CRM System. An IT professional will be required to maintain network stability and CRM’s Client Software installation and configuration. All cost will be bear by ABC Group.

1. Windows Server 2016 with antivirus installed- Appx. Cost : PKR 90,000/-
2. Windows Firewall for Network security - Appx. Cost : PKR 150,000/-
3. Internet Connection for WIFI networking (PTCL or any other Internet Service provider)
4. CRM client PCs – will be connected via WIFI connection

Part 3 – Duration and Costing

Duration of this project is about 2 months (plus one month deployment and testing phase).

The cost of Software (Listed modules in Part 1-Software Modules) is PKR 850,000/-.

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